

**CLAIMS:**

What is claimed is:

1. A method of preparing a tax return comprising the steps of:

5       subscribing to a financial recording service provider;

          receiving tax data from the financial recording service provider;

10       validating the tax data received from the financial recording service provider; and,  
          submitting the validated tax data.

2. The method of Claim 1 wherein the validated tax data is submitted to a tax authority.

15       3. The method of Claim 1 wherein the validated tax data is submitted to the financial recording service provider.

4. The method of Claim 1 wherein the validated tax data is submitted to a tax return preparation service.

20       5. The method of Claim 1 further comprising the step of:

          updating the client taxpayer's tax data with additional financial data.

25       6. A method of preparing a tax return comprising the steps of:

          receiving tax data associated with a client taxpayer from an institution;

          seeding a tax return with the tax data received from

the institution; and,  
validating the tax data.

7. The method of Claim 6 wherein the client taxpayer  
may validate the tax data in the tax return.

5 8. The method of Claim 6 further comprising the steps  
of:  
updating the tax data with additional tax data.

9. The method of Claim 8 wherein validating the  
additional tax data is performed by the client taxpayer.

10 10. The method of Claim 8 wherein validating the  
additional tax data is performed by the financial  
recording service provider.

15 11. The method of Claim 8 wherein validating the  
additional tax data is performed by a tax return  
preparation service.

12. The method of Claim 8 wherein validating the  
additional tax data is performed by the institution.

13. The method of Claim 6 further comprising:  
billing the client taxpayer subscriber.

20 14. A system for preparing a tax return comprising:  
means for subscribing to a financial recording  
service provider;

means for receiving tax data from the financial  
recording service provider;

25 means for validating the tax data received from the

financial recording service provider; and,  
means for submitting the validated tax data.

15. The system of Claim 14 wherein the validated tax data is submitted to a tax authority.

5 16. The system of Claim 14 wherein the validated tax data is submitted to the financial recording service provider.

17. The system of Claim 14 wherein the validated tax data is submitted to a tax return preparation service.

10 18. The system of claim 14 further comprising:  
updating the tax data with additional financial data.

15 19. A system for preparing a tax return comprising:  
means for receiving tax data associated with a client taxpayer from an institution; and,  
means for seeding a tax return with the tax data received from the institution.

20. The system of Claim 19 wherein the client taxpayer may validate the tax data.

20 21. The system of Claim 19 further comprising:  
means for updating the tax data with additional tax data.

22. The system of claim 21 wherein validating the tax data is performed by the client taxpayer.

23. The system of Claim 21 wherein validating the tax data is performed by the financial recording service provider.

24. The system of Claim 21 wherein validating the tax data is performed by a tax return preparation service.

25. The system of Claim 21 wherein validating the tax data is performed by the institution.

26. A method of preparing a tax return, comprising the steps of:

receiving tax data from an institution; and,  
indexing the tax data associated with a client taxpayer subscriber.

27. The method of Claim 26 further comprising the step of:

selectively providing access to the tax data associated with the client taxpayer subscriber.

28. The method of Claim 27 wherein the access to the tax data is provided to an authorized requester.

29. The method of Claim 28, wherein the authorized requester is one of the client taxpayer subscriber, a government tax authority, or a third party tax return preparation service.

30. A system for preparing a tax return comprising:  
means for receiving tax data from an institution;  
and,  
means for indexing the tax data associated with a

client taxpayer subscriber.

31. The system of Claim 30 further comprising:  
means for selectively providing access to the tax  
data associated with the client taxpayer subscriber.

5 32. The system of Claim 31 wherein the access to the tax  
data is provided to an authorized requester.

10 33. The system of Claim 32, wherein the authorized  
requester is one of the client taxpayer subscriber, a  
government tax authority, or a third party tax return  
preparation service.

15 34. A computer program product for preparing a tax  
return comprising the steps of:  
first instructions for receiving tax data from the  
financial recording service provider;  
second instructions for validating the tax data;  
and,  
third instructions for submitting the validated tax  
data.

20 35. The computer program product of Claim 34 wherein the  
validated tax data is submitted to a tax authority.

36. The computer program product of Claim 34 wherein  
the validated tax data is submitted to the financial  
recording service provider.

25 37. The computer program product of Claim 34 wherein the  
validated tax data is submitted to a tax return  
preparation service.

38. The computer program product of Claim 34 further comprising:

fourth instructions for updating the tax data with additional financial data.

5 39. A computer program product for preparing a tax return comprising the steps of:

first instructions for receiving tax data associated with a client taxpayer from an institution;

10 second instructions for seeding a tax return with tax data received from the institution; and,

third instructions for validating the tax data.

40. The computer program product of Claim 39 further comprising:

15 fourth instructions for submitting the validated tax return to a tax authority.

41. The computer program product of Claim 39 wherein the client taxpayer may validate the tax data in the tax return.

20 42. The computer program product of Claim 39 further comprising:

fourth instructions for updating the client taxpayer's tax data with additional tax data; and,

fifth instructions for validating the additional tax data.

25 43. The computer program product of Claim 42 wherein validating the tax data is performed by the client taxpayer.

44. The computer program product of Claim 42 wherein validating the tax data is performed by the financial recording service provider.

5 45. The computer program product of Claim 42 wherein validating the tax data is performed by a tax return preparation service.

46. The computer program product of Claim 42 wherein validating the tax data is performed by the institution.

10 47. The computer program product of Claim 42 further comprising:

sixth instructions for billing the client taxpayer subscriber.

48. A computer program product for preparing a tax return comprising:

15 first instructions for receiving tax data from an institution; and,

second instructions for indexing the tax data associated with a client taxpayer subscriber.

20 49. The computer program product of Claim 48 further comprising:

third instructions for selectively providing access to the tax data associated with the client taxpayer subscriber.

25 50. The computer program product of Claim 49 wherein the access to the tax data is provided to an authorized requester.

51. The computer program product of Claim 50 wherein the authorized requester is one of the client taxpayer subscriber, a government tax authority, or a third party tax return preparation service.

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